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ACADEMIC POLICY SERVICES CUSTOMER SERVICE AND COMMUNICATION STRATEGY - CURRICULUM MANAGEMENT

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DOCUMENT APPROVAL

Approved By (name/position of approver)	Signature	Date
Sue Smurthwaite, Director, Academic Policy Services	**Sue Smurthwaite**	**8th July 2014**

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1 Introduction

1.1   Executive summary

A key value underpinning the Mission statement for Corporate Services is 'Service - we will have a positive customer service ethos, characterised by timely, responsive and proactive advice and action.'

A customer service and communication strategy has been developed within Academic Policy Services (APS) to ensure that:

- we strengthen the culture within the APS team where customer service is valued;
- we deliver a high quality customer service that is consistent, responsive and technologically savvy;
- we develop digital solutions that provide self-serve capabilities to our customers;
- we develop clear communication pathways;
- we further refine decision processes to obtain efficient and effective timeline management and quality assurance.

The successful implementation of the strategy will provide benefits for both our customers and APS by creating a customer service culture where the customer is valued and is integral to all workflows and processes.

The proposed strategy is aligned with the divisional and University strategic objectives and values. It identifies potential barriers and proposes solutions for overcoming those challenges.

Within the curriculum management framework a key purpose of developing the strategy is to:

- support further enhancements of the Curriculum Approval Information Database (CAIDi) as the University's medium term online curriculum management system (CMS)

A further review of CAIDi will be conducted at an appropriate level and resources secured for its ongoing support, if CAIDi is to become an ongoing system.

In response to the customers' needs identified in section 3 of the document, a two-year strategy for 2014-2015 has been proposed.

2 Academic Policy Services Customer Service and Communication Strategy - overview

2.1 Key purposes

A key value underpinning the Mission statement for Corporate Services is:

"Service
- We will have positive customer service ethos, characterised by timely, responsive advice and action.
- We will exemplify a service, not servile, culture based on mutual respect."

A customer service and communication strategy has been developed within Academic Policy Services (APS) to ensure that:

- we strengthen the culture within the APS team where customer service is valued;
- we deliver a high quality customer service that is consistent, responsive and technologically savvy;
- we develop digital solutions that provide self-serve capabilities to our customers;
- we develop clear communication pathways;
- we further refine decision processes to obtain efficient and effective timeline management and quality assurance.

Also within the curriculum management framework a key purpose of developing the strategy is to:

- support further enhancements of CAIDi as the University's medium term online curriculum management system (CMS);

2.2 Values

Key values underpinning the APS customer service and communication strategy are:

- Excellence – always doing what we say we will do and continually striving for quality and best practice. Ensuring that what we do is visible and speaks volumes on how we conduct our business.

- Professionalism – provide service with professional expertise, underpinned by our core competencies that will result in timely, consistent and proactive delivery while continuing to increase and improve the use of IT solutions.

- One Team – respecting each other whilst working together to achieve mutually beneficial results. We will promote one message, one solution, one vision.

- Open communication – develop cross-functional teams to allow for the free flow of information. We will work across boundaries to improve the flow of communication with Faculties and other stakeholders.

- Learning environment – to work in an environment where everybody feels secure and takes responsibility to gain the required development to meet our customers' needs.

These values provide guidance for how we perform our duties and how we treat our customers; they also offer a framework for achieving our goals and increasing the effectiveness of the strategy. These values form the basis for achieving cultural change.

2.3 Barriers

In the process of developing a customer service and communication strategy the following barriers in achieving successful implementation have been identified:

- Multiple stakeholders with diverse needs (key stakeholders within the curriculum management framework are identified in section 3)

- Need for a cultural change caused by the implementation of a new product and new processes may require some adjustments in terms of users' technological skills and a temporary increase of workloads. In some cases it may require a review of internal faculty processes and workflows to dovetail with central administration processes.

- Barriers in communication – constraints of communication at faculty and inter-faculty levels. A need to continue to improve communications and collaboration across boundaries is recognised as one of the priority areas in the Corporate Services Efficiency and Effectiveness Strategy. Furthermore communication strategies for working across boundaries have been identified in the APS OPP 2014 as one of its priorities alongside policy, curriculum management and committees, highlighting the importance of this issue.

- Limited resources – the new strategy will be incorporated as core business and reliant on current physical, human and financial resources and existing knowledge base. It is important to carefully manage expectations of all stakeholders in further enhancements of CAIDi, if they involve resource implications. In addition, CAIDi has been defined as a **medium term** online CMS. Further clarification about its future should be considered at an appropriate level in due course.

2.3.1 How can we overcome these barriers?

- **Utilising existing policies as reference point**. Ultimately, all advice from the Curriculum Management Team is based on the relevant policy and/or guidance from the approval boards. It is a shared responsibility that all team members keep up to date with current policy and refer customers to relevant policy at every opportunity. We need to encourage a self-serve and self-informed approach via the University Policies website.

- **Delivering consistent and timely messages across all media with maximum focus on IT**. Communication forms an integral part of the way that APS conducts its business and for this reason the communication part of the strategy has an overarching nature. The flow of information within the team and across the University is a critical aspect of the functioning and success of curriculum management.

  Communication channels currently used by the Curriculum Management Team include: phone (individual and helpline), emails (individual and generic curriculum mailboxes), CAIDI functions (reports, feedback and comments), meetings (workshops, Faculty Reference Group); websites (curriculum portal, SharePoint, Wiki), agenda and minutes. If managed correctly, communication is a tool that will lead to better customer service. Development of a communication matrix, with identified levels of communications across the University, will assist in ensuring we deliver consistent messages. While focusing on IT solutions, communication strategies will remain flexible enough to allow for personal contact with the customer.

- **Strengthening the team culture**, where the customer is valued and is integral to all workflows and processes. This culture will be embedded in our key values which will be used to guide team members in their decision-making process when interacting with customers. It is proposed that the following steps will be taken in order to create a customer service culture within the APS team: (1) set goals that are customer-service oriented, (2) educate the team about importance of customer service (3) provide training opportunities (4) acknowledgement for the right approach.

- **Using our core competencies**. To achieve success in implementing the customer service and communication strategy the following core competencies have been identified:
  - IT competency
  - the ability to engage with stakeholders,
  - good communication skills
  - attention to detail
  - facilitation / consultation skills
  - change management skills

- database design and database management

A combination of these core competencies supported by reliable internal processes will position the team well when delivering good customer service. However, a 'gap analysis' of the above core competencies within the APS team will be undertaken and provisions made for skills development where necessary.

3 Curriculum Management - Customer groups identified

During the first stage of planning a targeted customer service and communication strategy, within the framework of curriculum management, clusters of customers were identified based on their roles in the curriculum management process and their common needs.

3.1   Curriculum Developers

This group contains all curriculum developers (academic or professional) responsible for creating new curriculum items in undergraduate and postgraduate areas.

Their needs have been identified as follows:

Curriculum Developers	
	Create proposals (new units/majors/honours/postgraduate courses)
	Make changes (annual, fast track, changes due to unforeseen circumstances)
	Respond to feedback
	Quality assurance role
	Share proposals with others
	Watch other proposals
	View, search, look up summary and history
	View and print reports (final reports and reports with track changes)

3.2   Faculty Administrative Teams

Faculty Administrative Officers (FAOs) and other faculty support staff required to have access to CAIDi. FAOs are responsible for managing the proposal throughout the faculty approval process. Once endorsed at the faculty level, FAOs submit the final version via CAIDi. Their roles and permissions vary depending on the faculty and its internal processes, however, in general terms, each FAO has been granted a submit permission, that allows them to undertake final quality checks, include the faculty approval details and submit new or change proposals.

The needs of Faculty Administrative Teams have been identified as follows:

Faculty Administrative Teams	
	Manage permissions to CAIDi at the faculty level
	Manage proposals (faculty approval details, submissions)
	Quality assurance role
	Manage internal processes and timelines
	Facilitate feedback and further review
	Support curriculum developers
	View, search, look up summary and history
	View and print reports (final reports and reports with track changes)
	Watch other proposals

3.3 Approving Boards

The Boards of Studies facilitate course development of undergraduate curriculum and the decision making at inter-faculty level and make recommendations to the Board of Coursework Studies (BCS). There are five Boards of Studies (BoS):
- BoS(Bachelor of Arts),
- BoS(Bachelor of Commerce),
- BoS(Bachelor of Design),
- BoS (Bachelor of Science),
- BoS (Bachelor of Philosophy(Hons)).

The Board of Coursework Studies (BCS) is a standing committee of the Academic Council with a significant central role in ensuring that future courses have educational integrity within the new framework, meet quality assurance standards, and align with the University's strategic directions

The needs of Approving Boards in relation to CAIDi/curriculum management processes have been identified as follows:

Approving Boards	View, search, look up summary and history
	View reports
	Quality assurance role
	For the future: access to interactive feedback on new proposals in line with policy

3.4 Other stakeholders

CAIDi inception was based on a concept of capturing curriculum data once and sharing with other stakeholders. Their needs and timelines vary significantly ranging from marketing and promotion of new courses through publications to government reporting requirements. This group of customers consists of:

- Student Systems
- Planning Services
- Admissions Centre
- International Centre
- Student Administration
- Timetabling
- Publications Unit
- Marketing and Communications
- Information Services (Library)

Generally, needs of this cluster of stakeholders could be identified as follows:

Other stakeholders	View, search, look up summary and history
	View reports: ad hoc, generic and bespoke
	Data extracting
	Email alerts
	Watch proposals

However, their needs are diverse depending on specific data requirements. It is envisaged that this group can be divided into low (ad hoc), medium (bespoke) and high (data) level users, as presented in Figure 1.

Figure 1 Other Stakeholder's Requirements
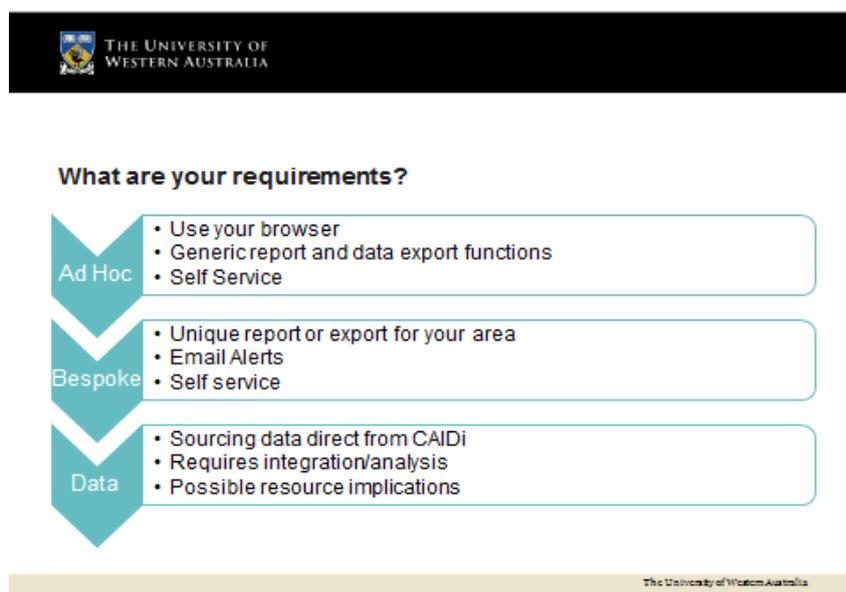
The general requirements of each level of stakeholders presented in Figure 1 might be further defined as follows:

1. Ad hoc – a direct user of existing functionality within the system. Requires access to CAIDI via an internet browser (Chrome recommended) in order to produce generic reports and data exports available through self-service.

2. Bespoke – a user of customised reports or export for a particular area. Requires access to CAIDI via an internet browser (Chrome recommended) in order to produce reports. Once created, a bespoke report becomes self-serviced.

3. Data – a user, who requires sourcing data directly from CAIDi, involves some level of integration and detailed analysis. Since this special request is likely to have resource implication, further discussions and negotiations with the Curriculum Management Team will have to take place on a case-by-case basis.

All stakeholders will be notified about new approvals via email alerts on a need-to-know basis.

3.5   Academic Policy Services

Academic Policy Services manages the process of curriculum approval and change and provides professional support and advice to the approving boards including the Academic Council, Board of Coursework Studies and five Boards of Studies. APS ensures appropriate governance with regard to the University's curriculum.

CAIDi has been developed and implemented by members of APS, which positions us well to deliver future enhancements. It also puts APS in a pivotal position to liaise with stakeholders, especially faculties, using its Faculty Reference Group meetings and its established change management methods.

CAIDi technical support is based in APS. The team members possess highly developed technical skills and knowledge of curriculum management processes. They are responsible for providing system design, planning, development and testing and also implementation of the new solution and any associated change management.

APS needs can be identified as follows:

APS	Processing new proposals (new units/majors/honours/postgraduate courses)
	Processing change proposals (fast track, annual change, changes due to unforeseen circumstances)
	Quality assurance
	Agenda preparation
	EO support
	Dissemination of information
	System fixes
	Data management
	Data sharing interfaces

4 Curriculum Management – Proposed strategy for meeting customers' needs

4.1 Goals for 2014-2015

Identification of customers and their needs presented in section 3 forms the basis of the customer service strategy. Due to limited resources addressing the diverse needs of multiple customers will need to be managed carefully. It will be beneficial to prioritise the needs, and manage the expectations of all stakeholders, in order to achieve realistic outcomes. It is also important to stress that an ongoing commitment to improvements in communication pathways between all stakeholders is vital in achieving success in this area.

In response to customers' needs and the divisional and University strategic objectives a two-year strategy for 2014-2015 has been proposed.

1. To support further enhancements of CAIDi as the University's medium term online CMS.

2. To clearly define and communicate customer service standards and goals within APS team.

3. To provide clear and consistent communication pathways.

4. To further refine decision processes to obtain efficient and effective timeline management and quality assurance.

5. To implement scenario based workshops/training opportunities on CAIDi for faculty based staff and other stakeholders.

6. To develop web-based CAIDi advice sheets.

7. To roll-out a self–serve approach to CAIDi data for central admin stakeholders.

5 Key Performance Indicator

Our overall strategy is to increase customer satisfaction from across the University in relation to curriculum management.

Our progress towards achieving this overarching strategy will be measured by a key performance indicator – a customer satisfaction survey.

The first step will be to undertake a customer satisfaction survey in October 2014 to establish, as a benchmark, the current level of customer satisfaction across each of seven goals listed.

A follow up survey will be undertaken in October 2015 with a KPI of maintaining, where the benchmark was 90% or above, or increasing the identified level of customer satisfaction from across the University to bring the average satisfaction across all seven categories from University-wide customers to a mean of 85% or higher.

Further KPIs and associated targets may be developed for the future.